

Watsonx Knowledge Management:

Preview Environment

Developed for Cigna

October 2024

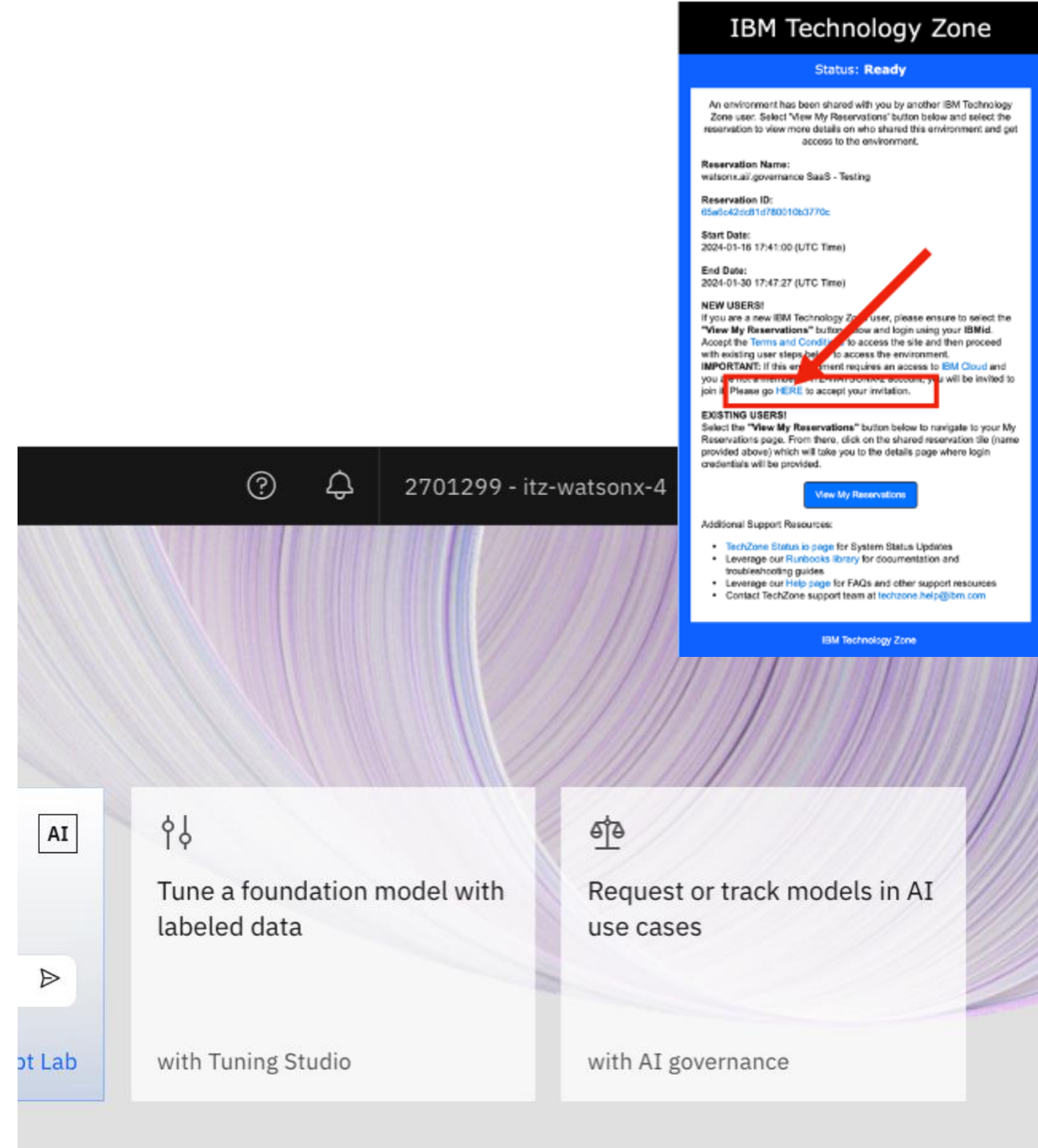


Agenda

- User onboarding
 - Validate proper access to corresponding services
- Preview Environment
 - Overview & Timeline
 - Usage Guidance
- Next steps
 - Recorded Walkthrough
 - Cadences

User Onboarding

- Follow this guide -> <https://ibm.biz/cigna-km>
- Create IBM ID (Already Done)
- Join Instance from Invitation Email
- Validate Access



Preview Environment - Overview

Use Case	Delivery	User...	System...	Design	Questions
Doc. Upload	10/09	<ul style="list-style-type: none"> Can ask questions of pre-loaded NIST security PDFs Can add a document (pdf/.docx) to IBM COS bucket. Can ask questions of newly indexed content the next day 	<ul style="list-style-type: none"> Chunks all repository documents <u>overnight (10 pm ET)</u> in COS bucket and index them into ElasticSearch 	<ul style="list-style-type: none"> 1 Assistant to ask questions against document upload use case 1 COS bucket containing the documents 1 uploads index 	<ul style="list-style-type: none"> Combine doc and web crawl into single assistant front end? If yes, recommend not duplicating pre-loaded documents into web crawl and PDF index
Web Crawl	10/09	<ul style="list-style-type: none"> Can ask questions of pre-loaded NIST security URLs Can add a specific url to a web crawl index via the ElasticSearch UI. HTML pages should be accessible to ask questions against as soon as crawl completes. 	<ul style="list-style-type: none"> Chunks all pages and index them into ElasticSearch 1 Assistant for web crawl use case 	<ul style="list-style-type: none"> 1 Assistant to ask questions against web crawl use case 1 COS bucket containing the documents 1 uploads index 	
Prompt Test	10/09	<ul style="list-style-type: none"> Can “chat with documents” by uploading a PDF directly to the UI to test prompt 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Document instructions 	
Modify Prompt	Walkthrough Date	<ul style="list-style-type: none"> Can use the default prompt instructions or enter prompt instructions in watsonx assistant. 	<ul style="list-style-type: none"> Passes prompt instructions as variable to custom extension 	<ul style="list-style-type: none"> Instructions on how to send prompt instructions 	

Usage Recommendations until Walkthrough

- Test questions against pre-uploaded documents & webpages
- Ideally wait to upload or crawl new docs until walkthrough
 - Otherwise, follow guidance document carefully

Preview Environment – Usage Notes

- Uploading Documents to COS Bucket:
 - Max memory size of *all* uploaded files should not exceed 1 GB.
 - Configured to query against .docx and pdf documents
- Web-Crawling Guidelines
 - As configured, preview environment does not have sufficient storage to crawl a large volume or many levels of webpages.
 - Add just individual webpages vs. crawling across multiple levels given an entry point.
 - Follow guidance carefully so that preview env. does not become over-capacitated .
 - No redirects
- Environment Instructions; <https://ibm.biz/km-env-instruct>



Users must adhere to IBM TechZone acceptable use policies: <https://techzone.ibm.com/terms>

Next Steps

- Scheduling Recorded Walkthrough
- Technical Cadences
- Feedback Cadences
 - How to collect feedback?

